Liger

System Alignment for HR Tech Growth

INDUSTRY

HR Services

SERVICES

HubSpot Cleanup and Optimization

HubSpot–Salesforce Integration Strategy and Implementation

Workflow and Automation Development

Data Synchronization Mapping and Validation

Marketing and Sales Enablement Consultation

OUTCOMES

Reduced Manual Lead Processing Time

Improved Marketing Attribution and Reporting

Reactivated HubSpot Sales Hub for Targeted Campaigns

TIMELINE

4 Months

01

Executive **Summary**

A leading Professional Employer Organization (PEO) and HR services company was working around disconnected marketing and sales systems. Their HubSpot and Salesforce environments were misaligned, causing data integrity issues, manual processes, and lost opportunities. Liger's technology team stepped in to overhaul their HubSpot system, clean up data, and reintegrate with Salesforce. This enabled automation, improved lead scoring, and unlocked advanced HubSpot features. The result was a bidirectional data sync and a more efficient and effective lead management process.

> *The transformation of our HubSpot and Salesforce integration has been a game-changer for our marketing and sales teams. Liger's expertise saved us time and helped us to fully leverage the power of HubSpot and Salesforce together.*
>
> *—Marketing Director*

02

The **Opportunity**

A leading professional employer organization had long relied on HubSpot for marketing and Salesforce for sales, but the two systems weren't effectively integrated. Years ago, an initial integration attempt resulted in data corruption, duplicate records, and misaligned workflows, prompting them to disable the sync altogether. Since then, they had resorted to manually exporting leads from HubSpot into Salesforce and vice versa to keep customer and prospect data in sync.

This workaround was inefficient, subject to potential errors, and time-consuming. The marketing team struggled to track lead engagement, escalate Marketing Qualified Leads into Salesforce, and effectively segment contacts. Meanwhile, sales lacked critical insights from marketing activities, reducing sales enablement capabilities. The client needed a comprehensive overhaul to reconnect the systems and modernize their processes.

03

The Process

Liger partnered with the client to analyze the full marketing-to-sales data workflow, map key processes, and identify the critical issues preventing effective integration. Working closely with the client's marketing team and Salesforce administrators, Liger's team took on a wide range of activities.

Cleaned Up HubSpot

Removed outdated and unnecessary data from past failed integrations, mapped essential fields, and established a "source of truth" to ensure consistent, reliable information across both HubSpot and Salesforce.

Re-Engineered Integration

Carefully planned and re-enabled the HubSpot–Salesforce sync by data type, including contacts, companies, deals, and activities to ensure a phased, controlled rollout to prevent data corruption.

Developed Lead Scoring and Automation

Replaced manual workflows with automated lead scoring models in HubSpot, defining clear criteria for MQLs based on engagement metrics. MQLs were automatically escalated to Salesforce, eliminating manual steps.

Improved Sales Enablement

Embedded HubSpot activity data into Salesforce views, giving the sales team full visibility into each lead's marketing interactions, including form submissions, email engagement, and web activity.

Reactivated HubSpot Sales Hub

Utilized previously unused HubSpot Sales Hub seats to implement targeted email sequences and nurture campaigns, unlocking new marketing capabilities and supporting the sales team's outreach efforts.

Collaboration and Validation

Engaged both the client's marketing and Salesforce teams throughout the process to ensure the integration met their needs, was secure, and operated as intended.

04

The **Outcome**

The integration overhaul delivered immediate and long-term value.

Manual data export/import processes were eliminated, significantly reducing marketing and sales workload for greater efficiency while maintaining data integrity and correcting previous data corruption issues.

Automated workflows and calculated fields replaced manual lead tracking, improving the accuracy of MQL identification and handoff to sales. At the same time, sales team gained greater visibility into lead engagement, enabling more informed conversations and higher conversion rates.

Previously unused Sales Hub capabilities were fully activated, supporting targeted campaigns and marketing automation that were impossible before. Tracking and reporting tools provided clear visibility into campaign performance, revenue attribution, customer segmentation, and smarter marketing strategies..

In just four months, Liger transformed a stalled integration into a streamlined, automated, and scalable lead management system that aligns marketing and sales, driving measurable business impact.